

Pylon Anywhere

7.0 Client User's Guide

Palm OS Platform



PUBLISHED BY:

Copyright (c) 2003-2006 by iAnywhere Solutions, Inc. Copyright (c) 1995-2006 by Nokia. All rights reserved. Unpublished rights reserved under U.S. copyright laws.

This publication is provided as is without warranty of any kind, express or implied, including, but not limited to, the implied warranties of merchantability, fitness for a particular purpose, or non-infringement.

This publication could include technical inaccuracies or typographical errors. Changes are made periodically to the information herein. These changes will be incorporated in new editions of the publication. iAnywhere Solutions may make improvements and/or changes at any time to the product(s) and/or the program(s) described in this publication.

AvantGo, iAnywhere, Pylon, SQL Anywhere, and Sybase are trademarks of Sybase Inc. or its subsidiaries. All other company names mentioned may be trademarks of the respective companies with which they are associated.

Acrobat Reader® Copyright 1987–2006 Adobe Systems Incorporated. All rights reserved. Adobe and Acrobat are trademarks of Adobe Systems Incorporated which may be registered in certain jurisdictions.

3Com, Palm Computing, and HotSync are registered trademarks, and Palm Pilot, Palm III, Palm OS, the Palm Computing platform logo, and all Palm logos are trademarks of Palm Computing, Inc., 3Com Corporation, or its subsidiaries.

Certicom, movian, movianCrypt, movianVPN, and SSL Plus are trademarks and/or registered trademarks of Certicom Corp.

Domino and Notes are trademarks, and Lotus and Lotus Notes are registered trademarks of Lotus Development Corporation.

InstallShield is a registered trademark of InstallShield Corporation.

Microsoft, Word, Excel, Access, ActiveSync, Visual Basic, Visual C++, and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Netscape is a registered trademark of Netscape Communications Corporation.

Sun is a registered trademark and iPlanet is a trademark of Sun Microsystems, Inc.

GroupWise is a trademark of Novell, Inc.

All terms mentioned in this book that are known to be trademarks or service marks have been appropriately capitalized. iAnywhere cannot attest to the accuracy of this information. Use of a term in this book should not be regarded as affecting the validity of any trademark or servicemark.

All other trademarks or registered trademarks are the property of their respective owners.

Contents

Chapter 1 – Getting Started	4
Understanding synchronization.....	4
Synchronizing using Pylon Anywhere.....	5
Chapter 2 – Setting Up Your Device	6
Starting the installation process.....	6
Installing Pylon Anywhere on your device.....	7
Chapter 3 – Synchronizing Your Device	8
Synchronizing your device.....	8
Modifying your synchronization settings.....	9
Using ‘What to Sync’ settings.....	9
Using ‘When to Sync’ settings.....	10
Using notification settings.....	11
Using connection settings.....	11
Using security settings.....	12
Chapter 4 – Using Sync Mail	13
Using SyncMail.....	13
Displaying your e-mail messages.....	13
Reading your e-mail messages.....	15
Creating e-mail messages.....	16
Creating meeting requests.....	16
Managing e-mail preferences.....	17
Chapter 5 – Using Pylon Anywhere	19
Using Pylon Anywhere on the Web.....	19
Viewing your activity log.....	19
Selecting contacts to synchronize.....	19
Setting up Push options.....	20
Chapter 6 – Configuring Optional Settings	21
Changing performance settings.....	21
Changing user information.....	21
Appendix – Quick Reference	22



CHAPTER

1

Getting Started

This chapter provides an introduction of how Pylon Anywhere can provide easy access to information. Pylon Anywhere runs on client computers and mobile devices and is the only application you need to stay connected while away from the office.

The sections in this chapter are as follows:

- Understanding synchronization
- Synchronizing using Pylon Anywhere

Understanding synchronization

Synchronization is the process of moving information between your Thoughtbus mailbox and your mobile device. Your device can receive e-mail messages and Personal Information Manager (PIM) information such as calendar entries, appointments, and contacts. Likewise, if you make changes to information on your device, the changes are updated to your Thoughtbus mailbox when you synchronize.

Synchronizing using Pylon Anywhere

Pylon Anywhere has an easy-to-use user interface (UI) and serves as your launch pad for delivery and synchronization for information on your device.

Using Pylon Anywhere, you can complete tasks such as the following:

- Send and receive e-mail messages
- Receive or update PIM information
- Review a log of activity for each synchronization
- Change settings and user preferences

Pylon Anywhere offers true synchronization with your Thoughtbus mailbox. For example, if you delete an e-mail message on your device, you also delete it from your Thoughtbus mailbox the next time you synchronize.



Setting Up Your Device

This chapter provides information on how to install Pylon Anywhere on your Symbian UIQ device.

Starting the installation process

Use the following instructions to install Pylon Anywhere on your device. Your system administrator should provide a URL (Internet address) or a location on your company's server to install the software on your device.

To start the installation process, complete the following steps:

1. Go to the following URL: <https://pylon.thoughtbus.com> The Pylon Anywhere Login page appears.
2. Enter your user name and password, and then click **Login**.
3. On the left navigation bar, click **Settings**. The Settings page appears.
4. Click **Add Sync Device**.
5. Select the Palm OS-Based Mobile Phone option, and then click **Next**.
6. Select the Carrier and Phone Number option, choose your wireless carrier from the list, enter your phone number, and then click **Send Message**.

The Install Software page appears with notification that a text message has been sent to your device.

Choosing to install Pylon Anywhere software wirelessly allows you to initiate the installation process over the air (OTA) and eliminate the need for synchronizations with laptops or other computers.

After you initiate the installation process, verify that you received a text message on your device.


Installing Pylon Anywhere on your device

To install Pylon Anywhere software on your device, complete the following steps:

1. Open the text message on your device.
2. Select the link in the text message for the installation file.
3. Select the **Install Software – Palm OS** link. The Download dialog box appears.
4. Select **Yes** for “Do you want to download?” to start the download process.
5. When the download process completes, select **Open** to start the install process. The Transfer dialog box appears.
6. Select **Yes** for “Do you want to accept into Applications folder?” to start the installation. Pylon Anywhere loads the software to your device.

After the installation process completes, you must to initiate your first synchronization session.

To start your first synchronization session on your device, complete the following steps:

1. Select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
 2. Select the **Sync** icon. A dialog box appears with the initial synchronization session options:
 - Refresh.** This option replaces the data on your device with data from your company’s server.
 - Merge.** This option combines data from your Thoughtbus mailbox with the data on your device. Selecting the Merge option may cause duplicate entries.
-  A screen may prompt you to scribble on the screen to create a random number for encryption. Use your stylus to scribble on the screen until the progress completes.
3. Enter your password and Pylon Anywhere will start the synchronization process.
When the synchronization session completes, the Pylon Anywhere main menu displays the status of the synchronized items.
 4. On the Install Software Web page, click **Next**. The Configure Account screen appears.
Your Palm OS device appears in the Device Name list. Pylon Anywhere is successfully installed on your device.



Synchronizing Your Device

This chapter provides information on how to synchronize and configure your Palm device. The sections in this chapter are as follows:

- Synchronizing your device
- Modifying your synchronization settings

Synchronizing your device

Pylon Anywhere synchronizes your e-mail messages and PIM information on your device with your Thoughtbus mailbox.

To synchronize your device, complete the following steps:

1. Select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. Select the **Sync** icon.



To view the progress of a synchronization session, select the Pylon Anywhere icon at the right bottom corner of the screen.

Modifying your synchronization settings

You can configure Pylon Anywhere to suit your individual requirements by changing the synchronization settings from their defaults.

Using ‘What to Sync’ settings

You can modify settings to manage your synchronization sessions. Complete the following steps to navigate to the What to Sync screen:

1. Using your device, select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. From the **Options** menu, choose **Settings**, and then choose **What to Sync**. The What to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable synchronization SyncMail folders (Inbox, Outbox, Sent, and Drafts) and PIM information (Calendar, Contacts, Tasks, Notes, and Travel Info).
4. Select **OK** to return to the Settings screen.

Modifying Mail – Inbox, Sent, and Drafts settings

Complete the following steps to modify each mailbox (Inbox, Sent Items, and Drafts) setting:

1. Using your device, select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. From the **Options** menu, choose **Settings**, and then choose **What to Sync**. The What to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Truncate after.** Enter the maximum number of characters to display for e-mail messages.
 - Remove Older Than.** Enter the number of days to retain e-mail messages on your device. Based on your permissions, your administrator may have disabled this setting.
 - Download Attachments.** Enable or disable attachments for e-mail messages.
 - Max Att Size (K).** Enter the maximum size for attachments.
 - Only certain types of files.** Enter valid attachment types.
 - Overwrite with server data.** Enable setting to overwrite any device data with data from your company’s server.
4. Select **OK** to return to the Settings screen.

Using ‘When to Sync’ settings

When to Sync settings allows you to select settings for SMS-based Push and ReadySync. To set up these options, follow these steps:

1. Using your device, select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Push**. Automatically synchronizes e-mail messages and PIM information.
 - Timed Interval**. Select an interval from the list. This indicates the frequency with which you want synchronization to occur.
 - Limit sync**. Select the daily or weekday setting for synchronization.
 - Not Before**. Enter the time when synchronization will not occur before this time.
 - Not After**. Enter the time when synchronization will not occur after this time.
 - Minimal battery level**. Enter a percentage of battery life at which you want to disable synchronization.
4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:
 - Use Network push**. Select this check box to automatically initiate a network connection.
 - Use SMS push**. Select this check box to automatically initiate a network connection when the device is powered off.
5. Select **OK** to return to the When to Sync screen, and then select **OK** to return to the Settings screen.

Guidelines for setting up Push options using your device

Use the following guidelines for setup and management of Push options. Because everyone has different levels of e-mail activity, settings for each person may vary. These guidelines help you determine the optimum setup for your conditions.

- Because your device synchronizes more often when you use the Push option, your device is powered-on more often. Adjust the power settings on your device to minimize battery drain.
- You may want to disable synchronization when battery power is below 20 percent.
- SMS-based Push relies on SMS messaging. Many service providers and carriers use a different billing structure for SMS messages. If you go over your allotted number of SMS messages within a billing period, you (or your company) may be charged additional fees. Check with your department manager or service provider to find out about SMS messaging restrictions.

Using notification settings

You can change the notification settings to manage your synchronization sessions.

1. Using your device, select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.
3. Select or clear the appropriate check boxes to enable or disable the following settings as necessary:
 - Notify when data received.** Select this check box for notification when your device receives new data.
 - Sound.** Select this check box to use sound when your device receives new data.
 - Show Alert.** Select this check box to show an alert when your device receives new data.

Using connection settings

You can modify the connection settings to manage your synchronization sessions.

1. Using your device, select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. Select the **Settings** icon, and then select **When to Sync**. The When to Sync screen appears.

3. Modify the following settings as necessary:
 - User name.** Enter a valid user name to access the server.
 - Server name.** Enter the server address.
 - Connection.** Select to keep connection active or disconnect if not needed.
 - Connection management.** Select the connection type for the server.
 - Detailed Progress Screen.** Select this check box for display detailed information during synchronization.



Contact your system administrator for appropriate values before you modify any connection settings.

4. Select **Advanced**. The Advanced screen appears. Modify the fields as necessary:
 - Use proxy server.** Select this check box to use a proxy server.
 - Address.** Enter the address of the proxy server.
 - Port.** Enter the port of the proxy server.
 - Bypass for local addresses.** Select this check box to bypass proxy server with a local address.
 - Username.** Enter the username of the local address.
 - Password.** Enter the password of the local address.
 - Enable other sync apps.** Select this check box to use other sync conduits such as Outlook or Palm Desktop.
5. Select **OK** to return to the sync main menu.

Using security settings

You can modify the connection settings to manage your synchronization sessions.

1. Using your device, select the **Pylon Anywhere** icon. The Pylon Anywhere main menu appears.
2. Select the **Security** icon. The When to Sync screen appears.
3. Select the Not-Assigned field and set a password to access your locked device.
4. Select **OK** to save your password, and then select **OK** again to return to the Security screen.
5. Select **Done** to return to the Pylon Anywhere main screen.



To lock your device, select the **Security** icon, and then select **Lock & Turn Off**.



CHAPTER

4

Using Sync Mail

This chapter provides information on how to view and manage your e-mail messages using SyncMail.

Using SyncMail

With Pylon Anywhere SyncMail, you can view and manage your e-mail messages. When you install Pylon Anywhere to your device, SyncMail acts as the primary e-mail client.







VersaMail and other Palm Mail-compatible clients do not work in conjunction with SyncMail.

Displaying your e-mail messages

You can quickly view your e-mail messages, meeting requests, and attachments. To display your e-mail messages, select the **SyncMail** icon. The Email screen appears.

For each e-mail message, SyncMail provides the following icons to identify the message type:

Icon	Function
	Complete message.
	Truncated message. A truncated message appears when it is larger than the size restrictions in Mailbox settings. By selecting this icon, you can mark the e-mail message to download the full text during the next synchronization session. The icon then changes to the Message Marked for Download icon.
	Message selected for download. The e-mail message downloads during the next synchronization session.

Icon	Function
	Meeting request.
	Attachment included.
	Attachment(s) removed. An attachment is removed when it is larger than the size restrictions in Mailbox settings or does not match the file types listed in Attachment settings. By selecting this icon, you can mark the attachment to download during the next synchronization session. The icon then changes to the Attachment(s) Selected for Download icon.
	Attachment(s) selected for download. The attachment(s) downloads during the next synchronization session.






When you select on the icon located next to each e-mail message, you can select from a list of the following options:

E-mail Message Option	Function
Delete	Moves the e-mail message to the Deleted folder. SyncMail deletes all e-mail messages in the Deleted folder during the next synchronization session. These e-mail messages are removed from your device and your company's server. Note: You can also delete e-mail messages by pressing the Backspace button on your device.
Move To	Moves the e-mail message to a folder of your choice.
Mark Read	Marks the e-mail message as read.
Reply	Opens the Reply E-mail screen for you to enter a reply message to the sender.
Reply to All	Opens the Reply E-mail screen for you to enter a reply message to the sender and all other recipients of the e-mail message.
Forward	Opens the Forward E-mail screen for you to forward the e-mail message.
Get Message	Marks the e-mail message to download the full text during the next synchronization session. This option displays the Message Marked for Download icon next to the e-mail message.
Get Attachment(s)	Marks the e-mail message to download the full attachment(s) during the next synchronization session. This option displays the Attachment(s) Selected for Download icon next to the e-mail message.

Reading your e-mail messages




To read your e-mail messages on your device, select the message header. A screen appears with the body of the e-mail message.

To reply to an e-mail message, use the following icons at the bottom of the screen:

Icon	Function
	Delete message.
	Reply to sender.
	Reply to all.
	Forward.
	Create a new e-mail message.

Responding to meeting requests

When you select a meeting request, you respond by using the following icons located at the bottom of the screen:

Icon	Function
	Accept meeting request.
	Decline meeting request.
	Make tentative meeting request.

When you select an icon, a screen appears with a reply e-mail message with your meeting request response. Select **Send** to respond to the meeting request. The e-mail message is sent to the Outbox folder and transmitted to the sender during the next synchronization session.

Viewing attachments

If your e-mail message has an attachment, select the attachment name to view it.



SyncMail provides QuickWord and QuickSheet to view attachments. QuickWord supports document and text attachment types. QuickSheet supports spreadsheet and Comma-Separated Values (CSV) files. Other attachment types are supported if you install the appropriate viewers. These viewers must support Multipurpose Internet Mail Extension (MIME) files.

Creating e-mail messages

You can create e-mail messages on your device using SyncMail. To create an e-mail message, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. Select the **New E-mail** icon at the bottom of the screen. The New Message screen appears.
3. Enter an e-mail address in the To: field.
 - ▶ You may enter several e-mail addresses by separating them with a semi-colon.
4. Enter text in the optional Subj: field.
5. Enter your message in the e-mail body.
6. Select the **Save** icon. Your e-mail message is sent to the Outbox folder and transmitted during the next synchronization session.

When creating an e-mail message, you can also use the following icons at the bottom of the screen:

Icon	Function
	Ready Text. Select from a list preformatted text for quick responses for e-mail messages.
	Save message to Outbox. This e-mail message will be sent with the next synchronization.

Creating meeting requests

You can create meeting requests on your device using SyncMail. To create a meeting request, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. Select the **New Meeting Request** icon. The Create Meeting screen appears.
3. Enter an e-mail address in the To: field.

▶ You may enter several e-mail addresses by separating them with a semi-colon.

4. Enter the necessary information for the meeting request.
5. Select **OK**. Your meeting request is sent to the Outbox folder and transmitted during the next synchronization session.

Managing e-mail preferences

You can configure SyncMail to suit your individual e-mail message requirements regarding general settings and standard e-mail folders. The types of SyncMail preferences include the following:

- **General**. These settings affect the general functionality of your e-mail messages.
- **Inbox**. These settings affect the way you manage e-mail messages in the Inbox folder.
- **Outbox**. These settings affect the way you manage e-mail messages in the Outbox folder.
- **Drafts**. These settings affect the way you manage your e-mail messages in the Drafts folder.
- **Sent**. These settings affect the way you manage e-mail messages in the Sent folder.
- **Deleted**. These settings affect the way you manage e-mail messages in the Deleted folder.

Setting general preferences

SyncMail general preferences allow you to select settings for your e-mail messages. To set up these preferences, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. From the **Options** menu, select **Preferences**. The Preferences screen appears.
3. Select the **General** tab.

4. Modify the following fields as necessary:
 - When replying, include body leading text.** Select this check box to enter leading text before the body of each reply e-mail message.
 - Include signature.** Select this check box to enter a custom signature for each e-mail message.
5. Select **OK** to return to the Email screen.

Setting standard e-mail folder preferences

The SyncMail preferences also allow you to select settings for e-mail messages located in the standard e-mail folders (Inbox, Outbox, Drafts, Sent, and Deleted). To set up these preferences, complete the following steps:

1. Using your device, select the **SyncMail** icon. The Email screen appears.
2. From the **Options** menu, select **Preferences**. The Preferences screen appears.
3. Select the appropriate tab (Inbox, Outbox, Drafts, Sent or Deleted).
4. Modify the following fields as necessary:
 - Show Date/Time.** Select this check box to display the date and time of e-mail messages.
 - Show Size.** Select this check box to display the size of e-mail messages.
 - Show Multi-Select.** Select this check box to select multiple e-mail messages. This preference displays a check box beside each email-message for multiple selections.
 - Header.** Select the amount of header information to show for each e-mail message.
 - After Deleting a Message.** Select from the list what to display after deleting an e-mail message.
5. Select **Sync Settings**. The Mailbox Settings screen appears. These are the same mailbox settings that are available on the What to Sync settings screen.



Using Pylon Anywhere

This chapter provides information on how to use Pylon Anywhere on the Web.

Using Pylon Anywhere on the Web

Pylon Anywhere on the Web allows you to add and manage your sync devices.

To access Pylon Anywhere on the Web, complete the following steps:

1. Go to the URL <https://pylon.thoughtbus.com> The Pylon Anywhere Login page appears.
2. Enter your user name and password, and then click **Login**. The Pylon Anywhere Web page appears.

Viewing your activity log

When you use Pylon Anywhere on the Web, you can review the status of a synchronization session with your device. To view an activity log for a synchronization session, click **Settings** on the left navigation bar, and then click **View Activity Log**. The Activity Log page appears.

Selecting contacts to synchronize

You can select which contacts you want to synchronize to potentially reduce the amount of data transferred between your company's server and your device. To take advantage of this feature, you must first assign a category to each contact using your company's e-mail software (such as Microsoft Exchange, Lotus Domino, or Novell GroupWise). Afterward, you can use Pylon Anywhere on the Web to select the categories you want to synchronize.

To select the contact categories to synchronize, click **Settings** on the left navigation bar, and then click **Pick Contacts to Sync**. The Pick Contacts to Sync page appears.

On this page, you can select the categories of contacts you want to synchronize to your device. Pylon Anywhere scans your contacts to find which categories are present and how many contacts are in each category.

Contacts who are not assigned to a category appear as “Unfiled.” If you do not select **Unfiled**, any contacts initially on your device and not assigned to a category will not be synchronized to your company’s server.

Setting up Push options

You can set up Push options using Pylon Anywhere on the Web. Using Push options allows you to stay up-to-date without having to initiate a synchronization session.

To set up your Push options, click **Settings** on the left navigation bar, and then click **Push Settings**. The Configure Push page appears.

Regardless of how you set up your options using Pylon Anywhere on the Web, you synchronize the Inbox when you send an e-mail message. For example, if you set up your Push filter to receive e-mail messages from only one person, no e-mail messages are pushed until the specified person sends you an e-mail message. Then, the entire contents (any new items) of your Inbox are synchronized to your device.

Guidelines for setting up Push options using the Web

When you begin using Push settings, consider using filters to impose a limit on number of the e-mail messages you receive. For example, in Push Monitor Settings, choose to monitor e-mail only. For Push Settings, choose to receive messages that are only marked as unread.

Remember, the complete contents of your Inbox are synchronized for every Push session, but a Push session is not triggered until your filter criteria are met. As you become familiar with how Push settings work in your environment, adjust your filters for better performance.



CHAPTER

6

Configuring Optional Settings

This chapter provides information on configuring optional account settings for Pylon Anywhere on the Web.

The sections in this chapter are as follows:

- Changing performance settings
- Changing user information
- Changing Web application settings

Changing performance settings

You can determine how much data you want to store in your Inbox, Sent Items, and Calendar folders. Click **Settings** on the left navigation bar, and then click **Performance Settings**. The Performance Settings page appears.

Changing user information

You may modify any user preferences such as name, address, e-mail address, and other basic information. Click **Settings** on the left navigation bar, and then click **General User Information**. The Configure User Settings page appears.



APPENDIX

A

Quick Reference

Use the following as a quick reference for using Pylon Anywhere with your Palm OS device.

Function	Instructions
View Pylon Anywhere screen	Select the Pylon Anywhere icon.
Synchronization	Select the Pylon Anywhere icon. From the Pylon Anywhere screen, select the Sync icon.
View e-mail and PIM information data on your device	Select the Pylon Anywhere icon, and then use the following: For Contacts, select the Contacts icon. For Calendar entries, select the Date Book icon. For Tasks, select the To Do icon. For E-mail, select the SyncMail icon.
View or change categories selected for synchronization	Select the Pylon Anywhere icon. From the Setup menu, choose Sync Settings .
Change Push/ReadySync settings	Select the Pylon Anywhere icon. From the Setup menu, choose Push/ReadySync .
Change connection settings	Select the Pylon Anywhere icon. From the Setup menu, choose Connection Settings . Contact your system administrator for the appropriate values.
Enable security settings	Select the Pylon Anywhere icon, and then select the Security icon.
View logs	Select the Pylon Anywhere icon. From the View menu, choose Log .

